We're Hiring!

Experienced Financial Advisors -

in Bellevue, Spokane, Portland, or Remote

HIRING FIRM: A Boutique Hybrid RIA in the Pacific Northwest

Affiliation: 1099 Independent Contractor

Key Benefits:

- **Headquarters:** Bellevue, WA / **Firm started** in 2013
- **Your Choice of Office Space: Bellevue or Spokane, WA; Portland, OR; or Remote**
- **Founders from:** Merrill Lynch, UBS, Goldman Sachs, Oppenheimer, and Piper Jaffrey
- **Full equity ownership** of your business with no restrictive covenants on your clients
- **Compensation Grid / Payout Range: 60 - 90%** (depending on the support/office space you need)
- **Research-based RIA**: Global Macro and individual equity research. Model & research support.
- **Firm Resources with no administrative burden:** Full support for your practice that includes support staff, back office, marketing, compliance, licensing, and registration, plus a dedicated transition team
- **Marketing:** We offer a comprehensive turnkey marketing program, including LinkedIn, SEO, Research, Webinars, Custom Advisor Websites, and more.
- **State-of-the-art technology** platforms, including Advyzon (CRM), MoneyGuidePro, Holistiplan, Advisor Jetpack, and Bloomberg Terminal.
- Exceptional client value proposition, including **integrated tax and personal legal services** for your clients
- Multi-custodial platform - **Schwab & Pershing**
- **Broker/Dealer** affiliation - with Cetera Advisor Networks, if needed
- **Commitment to Your Success –** Seeking advisors who are looking for a partnership for growth or succession.

Advisor Qualifications:

- You are an experienced advisor with **greater than $300K in T12 or $30 million in portable advisory AUM**
- Have an ***active*** FINRA Series 65 or 66 license
- Certified Financial Planner (CFP®) or Chartered Financial Advisor (CFA) designation (preferred)
- Desire to work in a fee-only advisory environment (residual brokerage can be accommodated)
- Enjoy working in a collaborative, collegial environment
- Demonstrate the highest ethical and professional behavior, adhering to industry regulations and compliance standards.

Company Benefits:

- 1099-only affiliation, which means business-related expenses are tax-deductible*
- Full Flexibility: With real estate, compensation, and support levels – because no two advisors are alike!

**Tax deductibility of business expenses depends on individual circumstances and IRS regulations. Consult a qualified tax professional for personalized advice.*

Contact: Maria at Club Level Consulting, maria@clublevelconsulting.com to confidentially discuss your goals.

Firm Identifier: RIA-S-HNW-PNW-F1